INDOT SiteManager version 3.9a Summary of Changes

Contract Administration

A)   Contracts window
      Obtain a location to store additional DBE data

      Navigation
               1   Contract Administration
               2   Contract Records
               3   Contracts
               4   Description Tab – Generic fields

               Fields:
               1   DBE Goal
               2   DBE Original Commitment Amount
               3   DBE Actual Ending Amount
               4   MBE Goal
               5   MBE Original Commitment Amount
               6   MBE Actual Ending Amount
               7   WBE Goal
               8   WBE Original Commitment Amount
               9   WBE Actual Ending Amount
               10 (IN) User Working on Process
               11 Date Cleared
               12 Compliance Indicator
               13 Date 30 Day Notice Letter is Sent

B)   Subcontracts: The Subcontracts window was modified so that a Subcontract Item cannot
      be deleted from a subcontract if that item is included on an approved estimate or an
      authorized DWR.

C)   Contract Authority: Future dating Contract Authority end dates.
      On the Contract Authority window, when a user selects the contract end date menu
      option for a user on a contract, a popup window is displayed. Users can enter the current
      or a future date and the system will set this as the contract end date for the user. All
      windows that use contract authority have been modified to check for the authority end
      date while validating and displaying contract lists

D)   Contract Funding:
      a) Generic fields relabeled for the following:
               1   P.O. Line Number Fiscal Year
               2   P.O. Line Number
      b) Data checks added:
               1   The following fields are now required fields upon saving:
                   i.   P.O. Line Number Fiscal Year

    ii. P.O. Line Number
   2 Verify the following data is the same for all records associated to a given Contract ID/Project/Project Line Number/Priority Order combination
    i. Purchase Order
    ii. P.O. Line Number Fiscal Year
    iii. P.O. Line Number

Daily Work Reports

A) Daily Weather Information
 a) Remove the ability to record daily weather information in the Daily Work Report window, DWR info tab.

  Remove the following fields from the Daily Work Report window, DWR Info tab
  1 Temperature
   i. High
   ii. Low
  2 Weather Conditions
   i. AM
   ii. PM

 b) Add the ability to record daily weather information in the Diary window, Authorize tab
  Add the following Remark types to the Diary Remarks (also reflected in the DWR Remarks)
  1 PE/S High Temp
  2 PE/S Low Temp
  3 PE/S Weather
  4 PE/S Traffic Control Device

 c) IC 124 Weekly Report version xx.xx reflects weather information that is entered in the Daily Work Report

 d) IC 124 Weekly Report version xx.xx reflects weather information that is entered in the Diary

 e) IC 103 PE/S Daily Diary version xx.xx reflects weather information that is entered in the Daily Work Report

 f) IC 103 PE/S Daily Diary version xx.xx reflects weather information that is entered in the Diary

B) Spell Check functionality was added to the following windows:
 a) Daily Work Report window, DWR Information tab, Remarks

b) Daily Work Report window, Work Items tab, Remarks for individual item postings
c) Diary window, Authorize tab, Remarks

C) Attachment functionality was added to the following windows:
   a) Daily Work Report window, DWR Information tab
   b) Diary window, Authorize tab

D) Daily Work Report – Contractors tab, Contractor panel (top panel)
   a) Contractor entry is not readable unless selected
   b) Change the text and background color so that all contractor entries are readable.
   c) Note: Enter Supervisor information before editing Contractor panel - Nbr of Supervisors field. (Instruction has been added to the Contractor tab, Supervisor/Foreman Name panel)
   d) Note: Enter Personnel information before editing Contractor panel - Nbr of Workers field. (Instruction has been added to the Contractor tab, Personnel Type panel)

E) Users will not longer be able to navigate to the Stockpile Materials window from the DWR window, Services, Stockpiles.

F) DWR Templates associated to the Project Line numbers of a contract can be turned active and inactive by users who have update rights to the Contract Item – DWR Template window.

   a) If a DWR template is associated to a project line number and is marked as active in the Contract Item – DWR Template window, a DWR template must be used to enter data in the Placed Qty field in the Work Items tab of the Daily Work Report window. The Placed Qty field is not editable.

   b) If all the DWR Templates that are associated to a project line number of a contract are not checked active in the Contract Item – DWR Template window, then no templates are available to be used in new work item entries in the Work Items tab of the Daily Work Report window. The Placed Qty field is editable.

   c) If a DWR Template was associated to a project line number and was active when an item posting was created and then the DWR Templates was marked as not active, the DWR templates will not be available for new work item postings in the Work Items tab of the Daily Work Report, but will be available to view previous postings where the DWR Template was used.

G) The Edit menu option to cut/copy/paste was enabled on the Diary Adjustment window.

H) The DWR and Diary Preview reports available on the DWR and Diary windows were modified to allow resizing. The default window layout size is set to 4037 height and 2927 width

I) Navigation/link from DWR Work Item tab to Sample Information window – refer to Training document Creating a Daily Work Report, version February 2009, 3.9a

J) Work Items tab,
  a) The Installed indicator column is moved to the left side of the window
  b) If there were items that have posting on them for the given DWR, then when opening the Work Items tab, the items with postings will appear at the top of the items list.

Contractor Payments

A.) Users will not longer be able to navigate to the Stockpile Materials window with update rights from the Estimate Summary window, Services, Stockpiles.

Change Orders

A) label change
  a) Navigation
     1 Change Order Maintenance
     2 Change Order Items window
     3 Change Order Items tab
     4 Services: New CO Item
        Change Label from "**New CO Item**" to "**Select Existing Item for CO**"
     5 Select Contract Item Window opens

  b) Change label of "**Item Nbr**" to "**Project Line Nbr**"

B) field locations and tabbing orders
  a) Navigation
     1 Change Order Maintenance
     2 Change Order Items window
     3 New Contract Item tab

  b) Move the Contract Line Nbr (CLN) field so it's the first data entry window

  c) Change the tab order of the fields so that the CLN is the first field for data entry

  d) Move the Category field to below the Supplemental Description fields.

C) CLN messages
  a) Navigation
     1 Change Order Maintenance
     2 Change Order Items window
     3 New Contract Item tab

  b) User enters a CLN (Proposal Line Number).

1. CLN field must be 4 digits.

2. Cannot add an existing CLN on a project if there is only one project on the contract and that project already has the CLN.

3. An existing CLN cannot be added to a project if the CLN is a previously established item and the pay unit is LS

4. If the CLN is a previously established item and the pay unit is not LS, auto-populate the following fields:

> Item Code
> Units Type
> Spec Year
> Description
> Unit Price
> Supplemental Descriptions
> Category – (auto-populate after the Project Number is selected and if only one category is associated to the project)

5. If the CLN is not previously established, the user enters the data in the New Contract Item tab.

c) User enters the Project Number.
1. Cannot add an existing CLN to a project if the CLN has already been used on the project

d) User enters the Project Line Number (PLN)
1. Project Line Number field must be 4 digits

e) When there are multiple categories on a project, a category must be selected prior to leaving the New Contract Items tab.

f) Changing a change order from DRAFT to Pending:

1 On the Change Order Approval selection list, the logic to display the User IDs for the security groups has been modified to restrict the list to only those users who have authority for the change order's contract.

D) Change Order Function
Change Order Header window: Disable the Final Quantity Function. User cannot select the Final Quantity function

E) Discretionary/Non Discretionary Change Order Header Generic field

a) Make the Discretionary (D) or Non-Discretionary (ND) a drop-down list where the user selects Discretionary or Non-Discretionary

b) Make the Discretionary/Non Discretionary Change Order Header Generic field required to be populated when the change order's status is changed from DRAFT to PENDING.

1. If the field is not populated when the status is changed the following message will be displayed:

"Are you sure you want to change the status to Pending" (this message is the same as before the customization"

2. Users clicks "Yes"

3. Message appears stating the following:

4. "Discretionary Information: Discretionary (D) or Non-Discretionary (ND) is required."

5. User clicks "OK"

6. User is automatically navigated to the Change Order Generic field where the Discretionary (D) or Non-Discretionary (ND) field is located.

F) Denied Change Orders

a) Workflow:

1   A change order is sent for approval

2   A change order is denied

3   The status of the change order stays in Pending status

4   The PE/S can either:

   i)   Change the status of the change order to "Draft", update the change order and resend it for approval or

   ii) Change the status of the change order to "Draft", delete the items, time   adjustments and explanation and then the header. This could result with a skipped change order number.

5. The PE/S will not be able to change the status of a change order to "Denied"

G) Deleting new items from change orders

a) Workflow:

1   A new project line item is added to a contract via a change order.

2   Change order is still in "Draft" status

3   The user deletes this same item off of the same contract.

4. Previously the user had two prompts to answer:

   i. Do you wish to delete this Contract Item? Yes/No

   ii. Do you wish to delete this Change Order Item? Yes/No

5. Now the user will only be given on prompt to answer:

   i. Do you wish to delete this Change Order Item? Yes/No

   ii. The new project line item will be removed from the change order and the contract.

Materials Management

A) Attachment functionality was added to the following windows:
   a) Superpave Mix Design
   b) Portland Cement Concrete Mix Design
   c) Material Detail, Description tab
   d) Material Detail, Tests tab (test specific)

B) Maintain Sample Information window: Basic Sample Data tab
   The following items have been added to the **Status** drop-down list:
   a) Logged
   b) Pending Authorization
   c) Received
   d) In Testing

C) Maintain Sample Information window: Un-authorizing Sample Records
   Groups with the authority can un-authorized sample records that have been authorized.
   Comments for the un-authorization will be placed in Disposition Remarks.

General Functionality

B.) Attachments – Adobe Acrobat Program won't close
   When an attachment that was created in Adobe Acrobat 7 is viewed with Adobe Reader 7, an error message occurs when the attachment is closed. The attachment will close but the Adobe window will remain open and locked. The Object Store error message pops under the Adobe screen. The message states, "Bad runtime function reference at line 4 in close event of object u_te_ole." When the 'OK' button is clicked, the Adobe window closes.

   Adobe Acrobat will now close when closing a pdf attachment.

C.) Copy/Paste functionality was added to Remarks boxes
   a) If the remarks box (such as the ones seen on DWR, Diary and Diary Adjustments) is in   update mode, a right-click enables the edit menu with the cut, copy and paste functions. The green text box no longer appears.

   b) If the remarks box is protected (inquiry mode), a right-click enables the green text box (as was being done in SiteManager before the application of this fix) and the edit menu can be initialized from the green text box by performing a second right-click.

D.) Modified all SiteManager Attachment Icons to display a paperclip on the toolbar icon only when attachments are present.